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AUTHOR Caughman, Joan T.
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ABSTRACT

This task-simulation learning module on clerk-typist activities for secondary and postsecondary teachers and students, the third in a series of eleven task and in-basket simulations, was designed to provide individualized instruction in office occupations courses, such as introductory business and typewriting. The module is divided into two parts. The first, developed for teacher use, includes the following: teacher instructions; definitions of task and in-basket simulations; objectives (learning tasks); prior student experiences; necessary equipment, supplies, and resources; completion time; method of evaluation; pre-test with answer key; answer keys for four learning tasks; and worksheets. The second part, developed for student use, includes the following: objectives (learning tasks); prior student experiences; necessary equipment, supplies, and resources; description of simulation situation; and instructions for four learning tasks. (This module was developed around performance objectives 48, 52, 75, 76, 77, and 81 of the V-TECS [Vocational-Technical Education Consortium of States] Secretarial Catalog. Some other related office occupations instructional materials are available in ERIC--see note.) (EM)

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TASK SIMULATION

OFFICE PROCEDURES

TEACHER

B

CLERK-TYPIST ACTIVITIES

Developed by

Joan T. Caughman

State Department of Education
Office of Vocational Education
Office Occupations Education
Columbia, South Carolina 29201

In Cooperation With

Vocational Education Media Center
Clemson University
Clemson, South Carolina 29631

CE 019 793

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TEACHER INSTRUCTIONS

The task and in-basket simulations have been developed to supplement performance objectives in the V-TECS Secretarial Catalog. The simulations are designed for individualized instruction and can be used in several office occupations courses. Teachers involved in a 1976 EPDA workshop wrote the simulations and tested these materials in their classrooms. Suggested time limits may vary according to the ability and experience of your students.

The level of difficulty is noted on each simulation. "A" indicates an easy simulation, "B" average, and "C" difficult. This rating may vary according to capabilities of your students. Pre-tests are included in the task simulations.

Students should not write on the simulations. Answer sheets for the in-basket simulations are included in the teacher materials and should be duplicated as needed. The teacher key for in-basket simulations reflects one correct method of listing priorities. Evaluation should be flexible. If a student can justify answers which differ from the suggested answers, they should be accepted as correct. You may prefer to use the in-basket simulations as learning experiences rather than for evaluation purposes.

Teachers should complete each simulation before making assignments to students. You must be familiar with the contents in order to answer questions. Avoid giving too many directions and hints. The purpose of the simulations is to teach your students to think and to make decisions under pressure.

DEFINITIONS

A task simulation is an instructional technique in which the learner performs several different tasks. The simulation requires that the learner use previously acquired skills and knowledge in order to complete the tasks. An in-basket simulation is a technique in which a specific position is described and in which the learner is required to make decisions about the priority of each task described in the simulation. In an in-basket simulation, tasks are not performed by the student but are listed in order of priority.

THIS TASK SIMULATION CORRELATES WITH V-TECS PERFORMANCE OBJECTIVES 48, 52, 75, 76, 77, AND 81 OF THE SECRETARIAL CATALOG.

TITLE:

Clerk-Typist Activities

OBJECTIVES:

After reading the instructions that are given and obtaining the necessary supplies, the student will complete the following tasks in acceptable form as determined by the teacher in approximately 45 minutes.

Task 1 – Fill out service call form from handwritten note.

Task 2 – Type monthly inventory report from rough draft copy.

Task 3 – Type a letter in full block style from form letter filling in variables from sales representative's note and address an envelope.

Task 4 – Take a telephone message and type the sales order form and an envelope.

PRIOR STUDENT EXPERIENCES:

Instruction in an office procedures class dealing with various office tasks you might be expected to complete in a work situation.

NECESSARY EQUIPMENT, SUPPLIES AND RESOURCES

Student Materials for Office Procedures Task Simulation
Typewriter
Adding machine or calculator
Carbon paper
Copy paper
Pen or pencil
Eraser
Envelopes
Dictionary
Office Procedures textbooks
Typewriting textbooks
Secretarial Handbook

COMPLETION TIME:

This simulation should take 45 minutes for an average student to complete.

METHOD OF EVALUATION:

Teacher correction using attached keys.
A pre-test is included and may be used to determine whether students are ready for this simulation.

PRE-TEST

Directions: Record your answers on a separate sheet of paper.

1. Place the following items in correct order according to alphabetic and numeric filing rules.

   F 12610 _____

   E 43610 _____

   F 13665 _____

   D 21611 _____

2. Compute the following; write the total amount on a separate sheet of paper.

   a. $100.00 + 4% sales tax = _____

   b. 22 pencils @ 17 cents each = _____

3. Answer the following statements true or false.

   _____ The company name should be used when answering the telephone.

   _____ A file copy should be prepared for all outgoing letters.

   _____ Reference initials are typed on all business forms.

   _____ Telephone messages may be handwritten or typewritten.

PRE-TEST KEY

1. F 12610 D 21611

   E 43610 E 43610

   F 13665 F 12610

   D 21611 F 13665

2. a. $104.00

   b. $3.74

3. a. T

   b. T

   c. F

   d. T

TASK 1 ANSWER KEY

SERVICE CALL

Date July 31, 19-- Time 8:15 A.M. [x] P.M. [ ]

Name Mr. Henry Smith

Address Vacation Inn, 200 Sunset Blvd.

Service Address Columbia, SC 29208

Phone 795-3958 Apt. No. _____

SERVICE WANTED:

[ ] Install [x] Repair [ ] Deliver [x] Pickup

[ ] Contract [ ] Complaint [ ] Warranty [ ] Estimate

COMMENTS: Electronic calculator went "dead."

Product Elec. Calculator Make Ideal

Model #1430 Serial No. H428456

BILLING:

[ ] C.O.D. [x] Charge [ ] Repeat [ ] Guarantee

Promised for _____ Route _____

Serviceman _____ Taken by _____

This may be handwritten or typed.

TASK 2 ANSWER KEY

IDEAL CALCULATOR COMPANY

1330 University Street
Columbia, SC 29208

MONTHLY INVENTORY SHEET

MODEL	SERIAL NUMBER	MANUFACTURER	Date Received In Branch
420	G645100	Ideal	6/18
420	G645120	Ideal	6/30
420	G645121	Ideal	6/30
570	E445200	Sunback	7/10
570	E445201	Sunback	7/10
990	B775300	Ideal	7/15
990	B775301	Ideal	7/15
990	B775302	Ideal	7/15
1430	F289101	Ideal	6/20
1430	F289104	Ideal	6/20

TASK 3 ANSWER KEY

IDEAL CALCULATOR COMPANY
1330 University Street
Columbia, SC 29208

July 31, 19--

Mr. Larry Jones, President
XYZ Company
2192 Jackson Road
Columbia, SC 29208

Dear Mr. Jones

We at Ideal realize that increasing your cash flow by reducing your billing costs can contribute to your corporate health.

Mr. Jones, you will be pleased to know that Ideal has designed a billing system which can reduce costs and increase productivity. I shall contact you by phone within a few days to explain this efficient system.

Yours truly

Jack Davison
Sales Representative

urs

IDEAL CALCULATOR COMPANY
1330 University Street
Columbia, SC 29208

Mr. Larry Jones, President
XYZ Company
2192 Jackson Road
Columbia, SC 29208

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IDEAL CALCULATOR COMPANY
1330 University Street
Columbia, SC 29208

B & B Block
1776 Main Street
Columbia, SC 29208

10

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TASK 4 ANSWER KEY

IDEAL CALCULATOR COMPANY

1330 University Street
Columbia, SC 29308

Sold to B & B Block
1776 Main Street
Columbia, SC 29208

DATE: 7/31/--

Terms

Quantity	Description	Unit Price	Total
24 rolls	2-inch adding machine paper	.39	9.36
2	No. 71 adding machine ribbons	1.95	3.90
		Total	$13.26
		Sales Tax 4%	.53
		TOTAL	$13.79

FORM FOR TASK 1

SERVICE CALL

Date _____ Time _____ A.M. ☐ P.M. ☐

Name _____

Address _____

Service Address _____

Phone _____ Apt. No. _____

SERVICE WANTED:

☐ Install ☐ Repair ☐ Deliver ☐ Pickup

☐ Contract ☐ Complaint ☐ Warranty ☐ Estimate

COMMENTS: _____

_____

_____

Product _____ Make _____

Model _____ Serial No. _____

BILLING:

☐ C.O.D. ☐ Charge ☐ Repeat ☐ Guarantee

Promised for _____ Route _____

Serviceman _____ Taken by _____

FORM FOR TASK 2

IDEAL CALCULATOR COMPANY

1330 University Street
Columbia, SC 29208

MONTHLY INVENTORY SHEET

MODEL	SERIAL NUMBER	MANUFACTURER	Date Received In Branch

FORM FOR TASK 3

IDEAL CALCULATOR COMPANY

1330 University Street
Columbia, SC 29208

IDEAL CALCULATOR COMPANY
1330 University Street
Columbia, SC 29208

IDEAL CALCULATOR COMPANY
1330 University Street
Columbia, SC 29208

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FORMS FOR TASKS 3 & 4

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FORM FOR TASK 4

IDEAL CALCULATOR COMPANY

1330 University Street
Columbia, SC 29208

Sold to

DATE:

Terms

Quantity	Description	Unit Price	Total
		Total	
		Sales Tax 4%	
		TOTAL	

TASK SIMULATION

OFFICE PROCEDURES

STUDENT

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CLERK-TYPIST ACTIVITIES

OBJECTIVES:

After reading the instructions that are given,and obtaining the necessary supplies, you will complete the following tasks in acceptable form as determined by your teacher in approximately 45 minutes.

Task 1 – Fill out service call form from handwritten note.

Task 2 – Type monthly inventory report from rough draft copy.

Task 3 – Type a form letter filling in variables from sales representative's note and address an envelope.

Task 4 – Take a telephone message and type the sales form and an envelope.

PRIOR STUDENT EXPERIENCES:

Instruction in an office procedures class dealing with various office tasks you might be expected to complete in a work situation.

NECESSARY EQUIPMENT, SUPPLIES, AND RESOURCES:

Student materials for Office Procedures Task Simulation:
Typewriter
Adding Machine or Calculator
Carbon paper
Copy paper
Pen or pencil
Eraser
Envelopes
Dictionary

INSTRUCTIONS:

Complete the pre-test that accompanies this simulation.

SITUATION:

You are Ann Clayton, Branch Service Clerk for the Ideal Calculator Company. Your primary function is to assist the Branch Service Manager by performing a variety of routine clerical duties as directed.

Among your duties is receiving service calls from customers and preparing service call reports.

You type correspondence, reports, and records for the Branch Service Manager and the assistants. You operate an adding machine and/or calculator when preparing various records and reports.

There are three sales representatives, Tom Jones, Sue Smith, and Jack Davison, who work at this branch office. You are responsible for typing their order information forms, proposals, and correspondence. The sales representatives prefer to have their letters typed in block style with open punctuation. Envelopes are to be prepared for all items to be mailed. File carbon copies are to be prepared for all items except the service call form. The service call form may be handwritten or typed.

The sales representatives leave the office before your arrival most mornings; and when you arrive, you find the work requests on your desk. 1

INSTRUCTIONS:

On the morning of July 31, 19--, you find a folder which Jack Davison left on your desk. The following items are found in the folder.

TASK 1

Memo

from--

JACK DAVISON

Date 7/31/--
8:15 A.M.

Ann - Henry Smith
Vacation Inn
200 Sunset Blvd.
Columbia, SC 29208

Called - his electronic calculator went "dead"

Ideal Model # 1430
Serial # H 428456

Pick up, repair, and bill his account

Phone 795-3958

Jack

TASK 2

7/31/--

Machines Inventory

MODELS	SERIAL #	MANUF.	DATE RC'D
1430	F 289101	Ideal	6/20
1430	F 289104	"	6/20
420	G 645100	"	6/18
420	G 645120	"	6/30
420	G 645121	"	6/30
990	B 775300	"	7/15
990	B 775 301	"	7/15
990	B 775 302	"	7/15
570	E 445 200	Sunback	7/10
570	E 445 201	"	7/10

Ann -

I need a copy of this by 5 P.M. Please type it for me on a monthly inventory sheet. - Would be helpful to have model numbers in numerical order.

Thanks,
Jack

Memo from-- Date 7/31

JACK DAVISON

Ann-
Please type form letter "B"
to Mr. Larry Jones, Pres.
XYZ Company
2192 Jackson Rd.
Columbia, SC 29208 Thanks,
Jack

Dear

We at Ideal realize that increasing your cash flow by reducing your billing costs can contribute to your corporate health.

(name), you will be pleased to know that Ideal has designed a billing system which can reduce costs and increase productivity. I shall contact you by phone within a few days to explain this efficient system.

Yours truly

(representative's name)
Sales Representative

LETTER B

TASK 4

HELLO--

Ideal Calculator,

Ann Clayton--

May I help you?

Thank you for your order!

This is Bill Young at B & B Block. Please send me 24 rolls of 2 inch adding machine paper at 39 cents and 2 No. 71 adding machine ribbons at $1.95. That address is B & B Block, 1776 Main Street, Columbia, SC. The zip is 29208. Have a good day!